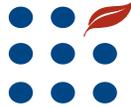




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Electronic Outlook Report from the
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Outlook for U.S. Agricultural Trade

FY 2008 Records Forecast: Exports Raised to \$108.5 Billion; Imports Increased to \$78.5 Billion

Fiscal 2008 agricultural exports are forecast at \$108.5 billion, up \$7.5 billion from February's forecast and \$26.6 billion above 2007. Grains and animal products account for two-thirds of the revision, with increases for all other groups except cotton. Higher unit values for wheat, feed grains, and rice plus a 2-million ton increase for corn and other feeds raise grain and feeds \$2.6 billion. Animal products are raised \$2.5 billion, with nearly half the increase is due to dairy products as unit values remain high and volumes increase. Oilseeds and products rise about \$1.8 billion. Slower-than-expected South American exports have extended the season for U.S. soybean shipments longer than expected. Horticultural products account for \$800 million of the increase aided by ample supplies, strong demand, and a weak dollar.

Fiscal 2008 agricultural imports are forecast at a record \$78.5 billion, up \$2 billion from February and \$8.5 billion above 2007. Oilseeds, grains and products account for almost half the year over year increase, boosted by higher unit values and volumes. Grain and feed values are forecast up \$700 million from February. Horticultural product imports are forecast to fall slightly from February, as a result of lower imports of fresh fruits and vegetables. Nevertheless, horticultural products are still \$2.4 billion above 2007. Sugar and tropical products, including coffee, cocoa, and rubber, are forecast up \$500 million from February, with coffee accounting for most of the increase due to higher unit values.

Table 1--U.S. agricultural trade, fiscal years 2003-2008, year ending September 30

Item	2003	2004	2005	2006	2007	Forecast	
						fiscal 2008	
						Feb.	May
						<i>\$ billion</i>	
Exports	56.0	62.4	62.5	68.6	81.9	101.0	108.5
Imports	45.7	52.7	57.7	64.0	70.0	76.5	78.5
Balance	10.3	9.7	4.8	4.6	11.9	24.5	30.0

Reflects forecasts in the May 9, 2008, *World Agricultural Supply and Demand Estimates* report.

Source: Compiled by USDA using data from Census Bureau, U.S. Department of Commerce.

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The next release is
August 28, 2008

Approved by the
World Agricultural
Outlook Board.

Economic Outlook

World growth is slowing as energy prices continue to rise, and the impact of the home mortgage crisis in the U.S. continues to spill over into foreign financial institutions. As the dollar weakens further, the world economy is more favorable to growth in U.S. exports and farm exports than expected earlier this year. U.S. gross domestic product grew 2.2 percent in 2007 with growth between 1.2 and 1.6 percent expected in 2008, down from prior forecasts. Slowdowns in North America, Europe, and Japan will keep world economic growth between 2.8 and 3.1 percent in 2008, down modestly from 2007 and a bit lower than the prior forecast. Growth in Asia, particularly China, and the transition economies is expected to be below 2007, in part due to higher raw material prices and slower growth in Europe and North America. Crude oil prices in 2008 are expected to be up over 40 percent from 2007, and gasoline, diesel, and heating oil prices are expected to rise 20, 26, and 22 percent, respectively. Fertilizer prices were up 65 percent in April compared with April 2007, partly offsetting the impact of higher commodity prices on farm income. The macroeconomic picture has deteriorated from earlier projections as growth in 2008 in the U.S., Japan, and Asia is slower than previously expected. Strong, but slower, growth in China should mitigate the size of the slowdown in non-Japan East Asia, offsetting the effects of weaker U.S. growth.

U.S. growth will slow in 2008 due to a sharp decline in housing construction, financial market disturbances, and very high energy prices. The U.S. banking system has provided additional capital so farm operators should continue to get commercial bank loans. Rising farm income and nonfarm exports will be growth areas in 2008. China's GDP is expected to grow 9 percent in 2008, bringing growth in the rest of East Asia of 4-5 percent. The rest of Asia is slated to grow over 5 percent, with India growing more rapidly, although somewhat below prior expectations. Strong international goods trade continues to support near-trend world growth. Good growth supports surging trade, continuing a cycle beginning in 2003. This robust trade growth will overcome the drag of very high industrial materials prices on every major economy and greater financing difficulties in Europe, North America, and parts of Asia.

The dollar exchange rate is an important determinant of U.S. agricultural trade. Relative to 2007, the dollar, adjusted for relative inflation rates, is expected to depreciate 3 percent against the euro, 10-13 percent against the yuan, and 6 percent against the Brazilian real, 2 percent against the Mexican peso, and 4 percent against the Argentinean peso in 2008. The dollar is forecast to be up 3 percent versus the yen and unchanged against the Canadian dollar in 2008. The dollar will be weaker overall, partly offsetting the impact of slowing world growth on U.S. exports.

Compared with the prior forecast, the economic environment is now perceived to be slightly less positive to U.S. farm exports as the rest of the world's growth weakens modestly from prior expectation and the U.S. dollar is weaker in most major markets. The oil market appears to have had only modest economic effects on most major U.S. trading partners, with Canada (as a major energy exporter) better off than expected given the large amount of trade with the United States. There is an increased probability of further slowing in the world economy, due to recent financial market volatility and continued high energy and input prices.

Export Products

Fiscal 2008 grain and feed exports are increased \$2.6 billion from the February forecast to a record \$35.3 billion. This is due to further upward revisions in wheat, rice, and coarse grain unit values, as well as increased shipments of corn and other animal feed (mainly dried distillers grains). Wheat is lowered 500,000 tons from February (still the highest in 15 years) to 30.5 million tons, mostly due to increased competition toward the end of the fiscal year from Europe and the Black Sea regions. An upward revision in wheat unit value more than offsets lower volume, to raise wheat export value \$450 million to a record \$10.5 billion.

A one-million ton upward revision increases corn shipments to a record 63 million tons. Higher volume and unit values increase corn export value to a record \$12.9 billion. Competition from China and Argentina remains largely absent. Strong demand and premiums for Brazilian corn in the European Union have made U.S. corn more attractive in many markets. The slight increase in corn unit value reflects anticipation of a tighter U.S. market, which is due to a potentially smaller domestic corn crop and a draw down in stocks.

U.S. rice exports are raised 100,000 tons to 3.9 million tons, based on additional sales to Eastern Mediterranean and Latin American countries. Increased volume, plus sharply higher unit value, boosts export value \$600 million to \$2.3 billion. Average unit value is raised to \$590 per ton. Unit values are well above the level implied by global demand and supply conditions, partially due to government intervention in markets.

The fiscal 2008 export forecast for oilseeds and products is \$20.7 billion, up \$1.8 billion from the February forecast. This increase is largely due to a 2.3-million ton upward revision in soybean export volume resulting from a further extension of U.S. soybean sales into the second half of the U.S. marketing year. The slower pace of Argentina's exports and the further appreciation of the Brazilian real against the dollar (which has kept U.S. soybeans more price competitive) further extended U.S. marketings. The average unit value for U.S. soybean exports was raised as well with more product moving late in the year when unit values are higher. Soybean oil volume is raised and is now forecast at 1.3 million tons with strong sales to Mexico, Latin America, and North Africa. Soybean meal volume is increased as well based on strong sales to Asia and the Caribbean.

The fiscal 2008 forecast for cotton exports is lowered \$500 million from February's forecast to \$5.1 billion due to a 300,000-ton reduction in shipments now forecast at 3.1 million tons. Since February, revisions to China's historical production figures increased that country's estimated stock levels and lowered the forecast for China's imports from all countries. Unprecedented U.S. futures market volatility and increased transportation costs may have also reduced sales opportunities for U.S. exporters.

Exports of livestock, poultry, and dairy products are forecast at \$20.5 billion in fiscal 2008, up \$2.5 billion from the February forecast. The improved outlook for dairy products to a record \$3.7 billion accounts for nearly half this adjustment, while pork and broiler meat account for much of the rest. Dairy prices remain higher and demand is stronger than expected. Drought in Australia and New Zealand has persisted, keeping global supplies tight and unit values from falling as much as expected from record highs in 2007. U.S. nonfat dry milk export volume

and unit value have increased, and this product should account for about 40 percent of U.S. dairy exports this year with Mexico as the largest foreign market. Cheese, whey, and butter fat collectively account for another quarter of U.S. sales with strong demand from many countries. Pork sets new export volume and value records. Pork exports are raised about \$475 million from the February forecast on a 200,000-ton increase, largely due to increased sales to China. Increased sales are supported by catering business for the Olympics, rising incomes, and reduced domestic supplies resulting from disease outbreaks and weather.

Horticultural exports are raised \$800 million to a record \$20.5 billion. Fresh and processed fruits, vegetables, and tree nuts are each raised \$200 million for a combined increase of \$600 million. Other processed horticultural crops, including essential oils and wine, are raised \$200 million as well. This broad-based revision reflects adequate supplies and strong foreign demand for products that are competitively priced due to the weaker dollar. Sales growth to Canada and the EU are exceptionally strong, and many emerging markets are showing strong gains as well. Crop conditions have been good, and almond acreage continues its multi-year expansion. The 2007 almond crop was up 23 percent above 2006. Since February, the forecasts for the 2007/08 orange and grapefruit crops were increased slightly. U.S. orange export volumes are running about 50 percent above the same period last year. Export volumes and/or values are up for juices, dried fruit, and many other products.

Exports of sugar and tropical products, including coffee and cocoa products, are increased \$200 million from February's forecast to \$3.9 billion. Canada and Mexico typically account for about 60 percent of the sales for this group. Much of the increase this year is due to sharply higher volumes and unit values for cocoa, sugar, and their related products.

Table 2--U.S. agricultural exports: Value and volume by commodity, 2007-2008

Commodity	October-March		Fiscal year 2007	Forecast fiscal 2008	
	2007	2008		Feb.	May
VALUE					
<i>---Billion dollars---</i>					
Grains and feeds 1/	11.053	18.565	24.089	32.7	35.3
Wheat 2/	2.408	5.984	6.365	10.1	10.5
Rice	0.659	0.887	1.279	1.7	2.3
Coarse grains 3/	4.817	7.810	9.794	14.1	14.7
Corn	4.404	6.718	8.922	12.4	12.9
Feeds and fodders	1.682	2.224	3.489	4.1	4.7
Oilseeds and products 4/	8.225	13.953	13.669	18.9	20.7
Soybeans	5.670	9.877	8.483	11.9	13.2
Soybean meal 5/	1.000	1.597	1.933	2.9	2.9
Soybean oil	0.274	0.837	0.611	1.0	1.4
Livestock, poultry, and dairy	7.533	10.155	16.342	18.0	20.5
Livestock products	4.911	5.942	10.106	11.4	12.4
Beef and veal 6/	0.780	1.037	1.894	2.3	2.3
Pork 6/	1.362	1.709	2.625	3.1	3.5
Beef and pork variety meats 6/	0.395	0.538	0.830	1.0	1.1
Hides, skins, and furs	1.056	1.054	2.159	2.1	2.1
Poultry and products	1.649	2.222	3.777	4.0	4.5
Broiler meat 6/ 7/	1.041	1.503	2.477	2.7	2.9
Dairy products	0.972	1.991	2.459	2.6	3.7
Tobacco, unmanufactured	0.786	0.880	1.144	1.3	1.3
Cotton	1.473	2.030	4.294	5.6	5.1
Seeds	0.573	0.717	0.946	1.2	1.2
Horticultural products 8/	9.037	10.160	17.997	19.7	20.5
Fruits and vegetables, fresh	2.308	2.590	4.776	5.1	5.3
Fruits and vegetables, processed 8/	2.119	2.522	4.402	5.0	5.2
Tree nuts, whole and processed	1.742	1.932	3.024	3.3	3.5
Sugar and tropical products 9/	1.679	1.933	3.455	3.7	3.9
Major bulk products 10/	22.644	27.467	31.359	44.7	47.1
Total 11/	40.362	58.397	81.947	101.0	108.5
VOLUME					
<i>---Million metric tons---</i>					
Wheat 2/	11.944	16.901	28.718	31.0	30.5
Rice	1.719	2.040	3.317	3.8	3.9
Coarse grains 3/	29.577	38.942	59.104	70.0	71.0
Corn	27.191	33.908	54.095	62.0	63.0
Feeds and fodders	5.536	6.874	11.655	12.4	13.7
Soybeans	21.253	22.131	30.319	27.4	29.7
Soybean meal 5/	4.293	4.476	7.971	7.9	8.1
Soybean oil	0.430	0.827	0.857	0.9	1.3
Beef and veal 6/	0.187	0.241	0.442	0.5	0.5
Pork 6/	0.539	0.689	1.004	1.2	1.4
Beef and pork variety meats 6/	0.246	0.312	0.506	0.6	0.6
Broiler meat 6/ 7/	1.215	1.414	2.525	2.7	2.7
Tobacco, unmanufactured	0.122	0.128	0.180	0.2	0.2
Cotton	1.064	1.301	3.104	3.4	3.1
Major bulk products 10/	65.679	81.442	124.743	135.8	138.4

Total may not add due to rounding.

1/ Includes corn gluten feed and meal, and processed grain products. 2/ Excludes wheat flour. 3/ Includes corn, barley, sorghum, oats, and rye. 4/ Excludes corn gluten feed and meal. 5/ Includes soy flours made from protein meals. 6/ Includes chilled, frozen, and processed meats. 7/ Includes only federally inspected product. 8/ Includes juices. 9/ Includes coffee and cocoa products, tea, and spices. 10/ Includes wheat, rice, coarse grains, soybeans, cotton, and unmanufactured tobacco. 11/ Includes cotton linters.

Source: Compiled by USDA using data from Census Bureau, U.S. Department of Commerce.

Regional Exports

The increase in the 2008 forecast is being driven by both higher unit values and volumes, and USDA has raised its forecast for virtually every regional market. The forecast for U.S. agricultural exports is increased to East Asia (up \$3.7 billion), the EU-27 (up \$2 billion), Latin America (up \$700 million), the Former Soviet Union (up \$500 million), Africa (up \$400 million), with North America and the Middle East each up \$300 million.

Asia

U.S. agricultural exports to Asia in 2008 are forecast at a record \$38.7 billion, up \$3.7 billion from the February forecast and \$9.4 billion higher than 2007. Over half of the revision is due to stronger than expected late-season soybean shipments to China (up \$2.1 billion). Exports are raised to South Korea (up \$700 million), Japan (up \$400 million), and Taiwan (up \$300 m) with higher grain values, larger shipments of soy oil and pork, and larger shipments and values for dairy and horticultural products. For 2008, Asia is expected to account for about 36 percent of total U.S. agricultural exports, roughly the same as its share in 2007.

U.S. exports to China are forecast to reach a record \$10.5 billion, up \$2.1 billion from the previous forecast and almost \$3.4 billion above 2007 levels. Much of the improved outlook is due to an increase in expected sales of soybeans. High-value products such as pork, dairy products, and soy oil are also growing. China continues to be the world's largest and fastest growing soybean importer, accounting for nearly half of U.S. soybean shipments. China's economy is expected to be among the fastest growing in the world in 2008.

U.S. exports to Japan are forecast to reach \$11.4 billion in 2008, up \$400 million from the previous forecast. Much of this increase in export value is due to higher expected grain and oilseed values in 2008, which boosts the value of major bulk commodity exports such as soybeans, corn, and wheat. In addition, Japan is a major export market for U.S. high-value products such as meats, dairy products, and horticultural products. For 2008, exports of these products are expanding faster than previously expected.

Fiscal 2008 exports to Southeast Asia are forecast at \$5.8 billion, unchanged from the previous forecast but up \$1.5 billion from 2007 levels. While the regional total is unchanged, there are revisions for the Philippines (up \$200 million) and Indonesia (up \$200 million). Wheat, soybeans, feeds and fodders, and a wide variety of consumer-oriented high-value products (particularly dairy products) dominate U.S. agricultural exports to Southeast Asia.

Europe, Africa, and the Middle East

U.S. agricultural exports to the markets in this region in 2008 are forecast at nearly \$28 billion, up \$2.9 billion from the previous forecast and up \$9.6 billion from 2007. Like Asia, the revisions since February are broad-based, with all major markets being revised higher—EU-27 (up \$2 billion), North Africa (up \$400 million), Middle East (up \$300 million), and Russia (up \$200 million). For 2008, these markets are expected to account for roughly 26 percent of total U.S. agricultural exports, up from 22 percent in 2007. Much of the increase is from increases in volumes and unit values for soybeans, dairy products, corn, and animal

feeds, and higher unit values for wheat and rice. Upward revisions in 2008 forecasts have been particularly noteworthy for the EU, with export strength in bulk commodities (particularly soybeans and wheat) and high-value products (particularly dairy products, pork, fruits, and nuts).

Exports to the Middle East region are typically dominated by sales to Egypt, Turkey, and Saudi Arabia. Fiscal 2008 exports to Egypt are projected to remain unchanged from February at \$2.2 billion, while exports to Turkey are forecast to reach \$2 billion (up \$200 million) rising on strong sales of soybeans, coarse grains and feeds, and soybean oil. Exports to Saudi Arabia are forecast to reach \$1.2 billion (up \$200 million) with strong U.S. sales of coarse grains, soybean meal, and dairy products. Other markets in the region are also expected to do well with rising commodity values, tight global grain supplies, and late-season shipments of soybeans and products.

Western Hemisphere

U.S. agricultural exports to Western Hemisphere markets in 2008 are forecast at a record \$40.7 billion, up \$1 billion from the previous forecast and up \$7.6 billion from 2007. While many of the forecasts for markets in the region are lower than in February, most of the increase is due to higher expected shipments to emerging Latin American markets. Driving the changes are higher unit values for grain, larger shipments of corn, other feed grains, and soybean oil, and rising meat and dairy product exports. For 2008, exports to Western Hemisphere markets are expected to account for 37 percent of total U.S. agricultural exports, down slightly from 2007.

Canada and Mexico are the United States' top two markets worldwide. Exports to both are forecast to continue the impressive growth shown over the past 15 years. Exports are forecast to reach a combined \$30.5 billion in 2008—up \$300 million from February and \$5 billion above 2007. This means that our two NAFTA partners currently account for 28 cents out of every dollar in worldwide U.S. agricultural exports—up from just 20 cents on the dollar when NAFTA went into effect 15 years ago. Exports to Canada are projected to reach a record \$15.8 billion, up \$100 million from the previous forecast and up \$2.6 billion from 2007, due largely to higher exports of meats, dairy products, soy oil, corn, and horticultural products. Exports to Mexico are forecast to reach \$14.7 billion in 2008, up \$200 million from the previous forecast and up \$2.4 billion from 2007, due largely to increased exports of wheat, soybeans and products, dairy products, and fresh fruit.

Table 3--U.S. agricultural exports: Value by region, 2007-2008

Country and region 1/	October-March		Fiscal year 2007	Forecast fiscal 2008	
	2007	2008		Feb.	May
<i>---Billion dollars---</i>					
Asia	14.642	22.155	29.321	35.0	38.7
East Asia	12.127	18.114	23.952	28.0	31.7
Japan	4.822	5.960	9.693	11.0	11.4
China	3.843	6.992	7.051	8.4	10.5
Hong Kong	0.546	0.751	1.082	1.4	1.6
Taiwan	1.439	1.886	2.932	3.5	3.8
South Korea	1.466	2.520	3.178	3.7	4.4
Southeast Asia	2.109	3.422	4.338	5.8	5.8
Indonesia	0.651	1.081	1.375	1.8	2.0
Philippines	0.463	0.847	0.950	1.5	1.7
Malaysia	0.256	0.313	0.508	0.7	0.7
Thailand	0.439	0.550	0.786	1.1	1.2
South Asia	0.406	0.618	1.031	1.2	1.2
Western Hemisphere	15.825	20.633	33.145	39.7	40.7
North America	12.124	14.984	25.516	30.2	30.5
Canada	6.136	7.715	13.206	15.7	15.8
Mexico	5.988	7.269	12.311	14.5	14.7
Caribbean	1.189	1.670	2.399	2.9	3.0
Central America	1.101	1.500	2.187	2.6	2.7
South America	1.411	2.479	3.042	4.0	4.5
Brazil	0.147	0.199	0.375	0.5	0.5
Colombia	0.575	0.878	1.115	1.5	1.5
Venezuela	0.183	0.560	0.518	0.8	1.1
Europe/Eurasia	5.360	7.727	9.824	12.3	14.5
European Union-27 2/	4.594	6.419	8.053	9.6	11.6
Other Europe 3/	0.183	0.296	0.331	0.5	0.6
FSU-12 4/	0.583	1.011	1.440	2.2	2.3
Russia	0.434	0.850	1.122	1.8	2.0
Middle East	2.095	3.609	4.224	6.1	6.4
Turkey	0.588	0.943	1.363	1.8	2.0
Saudi Arabia	0.249	0.530	0.537	1.0	1.2
Africa	1.886	3.489	4.246	6.6	7.0
North Africa	1.209	2.351	2.628	4.1	4.4
Egypt	0.769	1.119	1.645	2.2	2.2
Sub-Saharan Africa	0.677	1.138	1.619	2.5	2.6
Oceania	0.442	0.537	0.899	1.0	1.0
Transshipments via Canada 5/	0.113	0.248	0.288	0.3	0.3
Total	40.362	58.397	81.947	101.0	108.5

Total may not add due to rounding.

1/ Projections are based primarily on trend or recent average growth analysis.

2/ The former EU-25 plus Romania and Bulgaria who acceded in January 2007.

3/ Major countries include Switzerland, Norway, Iceland, and former Yugoslav states.

4/ The former 15 Republics of the Soviet Union minus the three Baltic Republics.

5/ Transshipments through Canada have not been allocated to final destination, but are included in the total.

Source: Compiled by USDA using data from Census Bureau, U.S. Department of Commerce.

Import Products

In the first half of fiscal year 2008, U.S. agricultural imports are up nearly 12 percent in value and more than 5 percent in volume (metric tons only). This indicates that import price inflation is about 6 percent. Despite the sluggish U.S. economy and the continued weakness of the dollar, import volume is expected to remain around 5 percent since food demand is relatively inelastic in the short run. Commodity and food prices are likely to be more stable over the spring and summer months as newly harvested crops supply the market, especially for fresh fruits and vegetables. Thus, a \$78.5 billion total import bill is forecast for 2008, \$2 billion more than February's forecast, and \$8.5 billion higher than in 2007. Half this increase is due to grains, oilseeds, and products.

Primary commodity prices, as measured by world food price inflation, have been on an upward trend since 2001, but have accelerated starting in 2007. The global food price index of the International Monetary Fund in early 2008 has doubled from 2001 levels. The U.S. import price index for foods, feeds, and beverages in early 2008 has risen 50 percent from 2003. With respect to U.S. farm commodities, prices received by farmers are also up by almost 50 percent since 2002.

For major farm commodity groups, demand is strongest for oilseeds, vegetable oils, and other oilseed products whose import volumes grew by 43, 27, and 25 percent, respectively. Shipments of soybeans, flaxseed, and rapeseed registered double-digit import volume growth. This is due in part to lower U.S. oilseed output in 2007/08. Despite their significantly higher prices, import demand for vegetable oils is driven by tropical oils from Southeast Asia. Demand for coarse grains was very strong as well, particularly for barley, oats, corn, rye, and processed coarse grain products.

Imports of livestock products are expected to be \$300 million higher than the February forecast and \$600 million more than in 2007. The upward change in the forecast is attributed to higher than expected prices for dairy products other than cheese. Like livestock and meats, import prices of dairy products saw double-digit increases, but unlike red meats' lower volume thus far, import volume of dairy products expanded by 3 percent year-to-date. The outlook for livestock and meats remains at \$8.9 billion—a \$200-million gain in cattle shipments is offset by a \$200-million reduction in beef imports. The gain for cattle is attributed to increased volume and higher average price per head. Beef import volume is reduced due to high U.S. cow slaughter and a weak U.S. dollar which raises the prices for imported beef. The value of swine is reduced due to lower expected unit values.

Although imports of horticultural products in aggregate are slower, especially for beer, wine, fresh fruits, and processed vegetables, demand for fruit and vegetable juices is strong. Similarly, demand for processed fruits and fresh vegetables remains relatively strong. Imports have slowed largely for products whose prices have risen significantly, such as processed fruits, processed vegetables, beer, and wine. Although the forecast for total horticultural imports in 2008 is lowered by \$200 million, the \$34.8 billion projection still represents a \$2.4-billion, or 7-percent, rise from 2007. This gain is attributed to processed fruits, including juices (up \$700 million), fresh vegetables (up \$235 million), processed vegetables (up \$250 million), fresh fruits (up \$200 million), and essential oils (up \$300 million). Fifty-four percent of imported fresh fruits and 58 percent of fresh vegetables arrive during the first half of the year (fall and winter seasons).

Prices of some tropical imports such as cocoa beans and rubber are at, or close to, their record highs. While prices of coffee beans and sugar are significantly higher than in 2002, they are still far from their record highs. As a result of these higher prices, the import values for coffee and cocoa are largely driving up the aggregate import value for tropical products (except vegetable oils and horticulture) in 2008 despite their lower year-to-date volumes. Rubber prices are also close to their record high in 2006, adding \$200 million to total tropical imports despite flat shipment volume. Although sugar prices are up from last year, they are far from their record high in 2005/06. Thus far, imported sugar and confections exhibit flat demand. The \$15.6 billion forecast for sugar and tropical products in 2008 is raised by \$500 million from the February 2008 forecast, and by \$1.46 billion from 2007.

Table 4--U.S. agricultural imports: Value and volume by commodity, fiscal years 2007-2008

Commodity	October-March		Fiscal year	Forecast	
	2007	2008	2007	fiscal year 2008	
				Feb.	May
VALUE	---Billion dollars---				
Livestock, dairy, and poultry	6.072	6.423	12.021	12.3	12.6
Livestock and meats	4.536	4.611	8.906	8.9	8.9
Cattle and calves	0.955	1.226	1.698	1.8	2.0
Swine	0.316	0.325	0.646	0.7	0.6
Beef and veal	1.626	1.409	3.386	3.2	3.0
Pork	0.605	0.556	1.211	1.2	1.2
Dairy products	1.326	1.593	2.653	3.0	3.2
Cheese	0.551	0.622	1.077	1.2	1.2
Grains and feed	2.898	3.602	5.993	6.8	7.5
Grain products	1.926	2.200	3.917	4.3	4.5
Oilseeds and products	1.810	2.951	4.018	5.6	6.6
Vegetable oils	1.264	2.046	2.774	4.1	4.5
Horticulture products	16.418	17.566	32.391	35.0	34.8
Fruits, fresh	2.910	2.993	5.406	5.8	5.6
Fruits, processed	1.616	1.945	3.418	4.1	4.1
Fruit juices	0.761	0.984	1.618	2.1	2.1
Nuts and preparations	0.530	0.596	1.079	1.2	1.2
Vegetables, fresh	2.411	2.568	4.165	4.5	4.4
Vegetables, processed	1.566	1.718	3.149	3.4	3.4
Wine	2.237	2.373	4.544	4.8	4.8
Malt beer	1.764	1.655	3.686	3.8	3.7
Essential oils	1.155	1.303	2.427	2.5	2.7
Cut flowers and nursery stock	0.785	0.814	1.531	1.6	1.6
Sugar and tropical products	6.901	7.593	14.141	15.1	15.6
Cane and beet sugar	0.404	0.411	0.814	0.9	0.8
Confections 1/	0.597	0.586	1.221	1.3	1.3
Cocoa and chocolate 1/	1.396	1.555	2.593	2.7	2.8
Coffee beans and products	1.712	2.015	3.654	3.9	4.3
Rubber, natural	0.979	1.092	2.087	2.2	2.3
Other imports 2/	0.766	0.789	1.472	1.7	1.5
Total agricultural imports	34.865	38.925	70.037	76.5	78.5
VOLUME	---Million metric tons---				
Wine 3/	0.445	0.430	0.869	0.9	0.9
Malt beer 3/	1.682	1.540	3.535	3.5	3.3
Fruit juices 3/	2.258	2.689	4.794	4.9	5.7
Cattle and calves 4/	1.329	1.583	2.320	2.6	2.6
Swine 4/	4.640	5.784	9.474	11.0	11.0
Beef and veal	0.486	0.411	1.026	1.0	1.0
Pork	0.211	0.191	0.424	0.4	0.4
Fruits, fresh	4.457	4.407	8.791	9.2	9.0
Fruits, processed 5/	0.684	0.704	1.442	1.5	1.5
Vegetables, fresh	2.523	2.676	4.384	4.8	4.7
Vegetables, processed 5/	1.505	1.508	2.954	3.0	3.0
Vegetable oils	1.285	1.628	2.637	3.1	3.3
Cocoa and chocolate	0.638	0.601	1.140	1.2	1.1
Coffee beans	0.671	0.659	1.370	1.4	1.4
Rubber, natural	0.483	0.487	1.005	1.1	1.0

1/ Confections are consumer-ready products that contain sugar. Cocoa and chocolate are intermediate products.

2/ Tobacco, planting seeds, and cotton. 3/ Liquid volume is in billion liters. 4/ Million head; includes bison. 5/ Excludes juices.

Source: Compiled by USDA using data from Census Bureau, U.S. Department of Commerce.

Regional Imports

Over the past 4 quarters (since fiscal 2007's third quarter), U.S. agricultural imports have grown at an average 11 percent. Imports from NAFTA are up 13 percent in that period, with shipments from Canada climbing twice as fast as Mexico's. But these import growth rates were exceeded by Central America (14 percent) on the heels of the U.S. free trade agreement with the region, by East Asia (20 percent) led by China, by South Asia (20 percent) led by India, and Southeast Asia (21 percent) as Indonesia and Thailand exports surged. Among the major exporting countries to the United States, China and India have expanded shipments the fastest at 26 and 21 percent, respectively. Since 2003, import growth rates from Brazil, Indonesia, Thailand, and Mexico follow China's double-digit pace, ranging from 14 to 19 percent. Due to distance, imports of fresh produce are largely from Latin America, while processed produce are increasingly shipped from Asia.

Canada and Mexico accounted for 25 percent of U.S. agricultural imports in 1990, but that share has grown to 35 percent by 2007. The European Union's share has remained steady around 21 percent, varying from 20 to 23 percent. Due largely to China, East Asia's share expanded to 5.4 percent in 2007 from 3.8 percent in 1998. In the past 3 years, the share of imports from South America has climbed from 11 to 13 percent, although the region's share in 1990 was 17 percent. It appears that higher import shares from NAFTA have been coinciding with lower shares from Latin America and Oceania. Even as the Canadian dollar has appreciated significantly against the U.S. dollar—38 percent since 2002—U.S. import growth from Canada remained above 20 percent annually over the past 12 years. Import growth from Mexico ranks next at 14 percent, on average, in the last 3 years and more than 12 percent since 1990. Not only has free trade paid off for our NAFTA partners, it also magnified their geographic advantage.

Table 5--U.S. agricultural imports: Value by region, fiscal years 2007-2008

Country and region	October-March		Fiscal year 2007	Share of total 2007	Forecast fiscal 2008	
	2007	2008			Feb.	May
	--- Billion ---			Percent	--- Billion ---	
Western Hemisphere	18.712	20.861	37.073	52.9	39.9	41.5
Canada	7.172	8.571	14.701	21.0	15.8	17.6
Mexico	5.138	5.534	9.916	14.2	10.4	10.7
Central America	1.404	1.609	3.112	4.4	3.4	3.6
Costa Rica	0.553	0.573	1.214	1.7	1.3	1.3
Guatemala	0.457	0.544	1.028	1.5	1.1	1.2
Other Central America	0.394	0.491	0.869	1.2	1.0	1.1
Caribbean	0.202	0.188	0.451	0.6	0.5	0.4
South America	4.796	4.958	8.893	12.7	9.8	9.2
Brazil	1.231	1.373	2.525	3.6	2.8	2.8
Chile	1.253	1.189	1.922	2.7	2.2	1.8
Colombia	0.786	0.865	1.519	2.2	1.6	1.7
Other South America	1.527	1.531	2.928	4.2	3.2	2.9
Europe and Eurasia	7.719	8.215	15.544	22.2	16.4	16.5
European Union-27 1/	7.444	7.886	14.987	21.4	15.7	15.9
Other Europe	0.242	0.287	0.490	0.7	0.6	0.6
Asia	5.062	6.329	10.813	15.4	13.2	13.6
East Asia	1.815	2.132	3.766	5.4	4.6	4.4
China	1.336	1.621	2.800	4.0	3.5	3.4
Other East Asia	0.479	0.511	0.965	1.4	1.1	1.0
Southeast Asia	2.671	3.446	5.834	8.3	7.2	7.6
Indonesia	0.862	1.139	1.939	2.8	2.5	2.6
Thailand	0.717	0.778	1.498	2.1	1.7	1.6
Other Southeast Asia	1.093	1.529	2.398	3.4	3.0	3.4
South Asia	0.577	0.751	1.213	1.7	1.4	1.6
India	0.519	0.688	1.094	1.6	1.2	1.4
Oceania	2.083	2.171	4.399	6.3	4.5	4.6
Australia	1.248	1.237	2.608	3.7	2.7	2.6
New Zealand	0.792	0.877	1.700	2.4	1.7	1.9
Africa	0.819	0.893	1.392	2.0	1.6	1.5
Sub-Saharan	0.710	0.770	1.178	1.7	1.4	1.3
Ivory Coast	0.380	0.450	0.482	0.7	0.6	0.6
Middle East	0.470	0.456	0.816	1.2	0.9	0.8
Turkey	0.286	0.277	0.478	0.7	0.6	0.5
Total	34.865	38.925	70.037	100.0	76.5	78.5

Totals may not add due to rounding.

1/ The former EU-25 plus Romania and Bulgaria who acceded in January 2007.

Source: Compiled by USDA using data from Census Bureau, U.S. Department of Commerce.

Reliability Tables

Table 6--Reliability of quarterly U.S. export projections, by commodity and quarter

Commodity	Average forecast errors					Forecast accuracy					Forecast accuracy
	fiscal 2002-07					fiscal 2002-07					
	Aug ¹	Nov	Feb	May	Aug ²	Aug ¹	Nov	Feb	May	Aug ²	
	-- Percent --					"X" if error ≤ 5%					Percent
Export value											
Grains and feeds	12	10	6	3	1	-	-	-	X	X	40
Wheat (and flour)	12	11	7	5	5	-	-	-	X	X	40
Rice	13	14	13	4	4	-	-	-	X	X	40
Coarse grains	23	15	9	3	1	-	-	-	X	X	40
Corn	24	15	9	3	1	-	-	-	X	X	40
Feeds and fodders	11	9	7	6	3	-	-	-	-	X	20
Oilseeds and products	9	9	6	4	2	-	-	-	X	X	40
Soybeans	14	9	8	6	3	-	-	-	-	X	20
Soybean meal	16	14	12	7	3	-	-	-	-	X	20
Soybean oil	18	27	13	9	9	-	-	-	-	-	0
Livestock, poultry, and dairy	12	9	7	4	3	-	-	-	X	X	40
Livestock products	12	10	6	3	2	-	-	-	X	X	40
Beef and veal	27	21	7	12	6	-	-	-	-	-	0
Pork	12	2	2	4	2	-	X	X	X	X	80
Beef and pork variety meats	13	6	0	0	5	-	-	X	X	X	60
Hides, skins, and furs	7	6	9	3	0	-	-	-	X	X	40
Poultry and products	13	11	10	5	4	-	-	-	X	X	40
Broiler (poultry) meat	18	19	17	7	1	-	-	-	-	X	20
Dairy products	19	15	11	12	5	-	-	-	-	X	20
Tobacco, unmanufactured	7	7	11	8	5	-	-	-	-	X	20
Cotton and linters	13	8	7	7	4	-	-	-	-	X	20
Planting seeds	5	9	9	7	2	X	-	-	-	X	40
Horticultural products	5	4	2	1	1	X	X	X	X	X	100
Fruits and preparations	4	4	3	2	2	X	X	X	X	X	100
Vegetables and preparations	5	4	3	4	2	X	X	X	X	X	100
Tree nuts and preparations	13	11	7	5	4	-	-	-	X	X	40
Sugar and tropical products	8	7	6	3	1	-	-	-	X	X	40
Major bulk products	6	7	7	7	5	-	-	-	-	X	20
Total agricultural exports	8	5	4	2	1	-	X	X	X	X	80
Average error and accuracy	13	11	8	5	3	13%	17%	20%	63%	93%	41
Export volume											
Wheat	8	7	5	3	4	-	-	X	X	X	60
Rice	13	13	11	4	3	-	-	-	X	X	40
Coarse grains	11	10	9	4	2	-	-	-	X	X	40
Corn	11	10	9	4	2	-	-	-	X	X	40
Feeds and fodders	5	10	3	4	2	X	-	X	X	X	80
Oilseeds and products	11	8	4	2	1	-	-	X	X	X	60
Soybeans	10	7	5	3	2	-	-	X	X	X	60
Soybean meal	20	9	8	4	2	-	-	-	X	X	40
Soybean oil	19	12	7	5	6	-	-	-	X	-	20
Beef, pork, and variety meats	16	15	8	2	1	-	-	-	X	X	40
Beef and veal	17	29	13	0	0	-	-	-	X	X	40
Pork	10	0	10	5	0	-	X	-	X	X	60
Beef and pork variety meats	20	0	0	0	7	-	X	X	X	-	60
Broiler (poultry) meat	12	12	10	3	3	-	-	-	X	X	40
Tobacco, unmanufactured	0	0	0	0	0	X	X	X	X	X	100
Cotton and linters	12	7	5	4	5	-	-	X	X	X	60
Horticultural products	4	2	3	2	0	X	X	X	X	X	100
Sugar and tropical products	8	8	8	3	0	-	-	-	X	X	40
Major bulk products	3	3	3	2	2	X	X	X	X	X	100
Average error and accuracy	13	11	9	5	3	19%	24%	43%	90%	86%	52

¹ Forecast made for following fiscal year, with 15 months out. ² Forecast made for current fiscal year, with 3 months remaining in current fiscal year. - = Error exceeds 5 percent.

Table 7--Reliability of quarterly U.S. export projections, by country and quarter

Country/region	Average forecast errors fiscal 2002-07					Forecast accuracy fiscal 2002-07					Forecast accuracy
	Aug ¹	Nov	Feb	May	Aug ²	Aug ¹	Nov	Feb	May	Aug ²	
Export value	<i>-- Percent --</i>					<i>"X" if error ≤ 5%</i>					<i>Percent</i>
Asia	---	6	6	3	2	---	-	-	X	X	50
East Asia	---	7	8	3	1	---	-	-	X	X	50
Japan	---	5	5	2	3	---	X	X	X	X	100
China	---	22	21	5	4	---	-	-	X	X	50
Hong Kong	---	10	10	6	2	---	-	-	-	X	25
Taiwan	---	9	9	6	3	---	-	-	-	X	25
South Korea	---	7	10	5	3	---	-	-	X	X	50
Southeast Asia	---	13	7	9	4	---	-	-	-	X	25
Indonesia	---	13	6	5	3	---	-	-	X	X	50
Philippines	---	14	11	6	6	---	-	-	-	-	0
Malaysia	---	4	0	4	4	---	X	X	X	X	100
Thailand	---	21	18	7	2	---	-	-	-	X	25
South Asia	---	22	20	18	10	---	-	-	-	-	0
Western Hemisphere	---	4	3	1	1	---	X	X	X	X	100
North America	---	4	3	2	1	---	X	X	X	X	100
Canada	---	3	2	1	1	---	X	X	X	X	100
Mexico	---	7	6	2	2	---	-	-	X	X	50
Caribbean	---	9	7	5	4	---	-	-	X	X	50
Central America	---	6	5	5	3	---	-	X	X	X	75
South America	---	8	10	7	5	---	-	-	-	X	25
Brazil	---	15	28	10	10	---	-	-	-	-	0
Colombia	---	8	8	0	2	---	-	-	X	X	50
Venezuela	---	21	14	0	12	---	-	-	X	-	25
Other Latin America	---	6	2	5	2	---	-	X	X	X	75
Europe and Eurasia	---	10	7	6	4	---	-	-	-	X	25
European Union-25	---	21	17	15	14	---	-	-	-	-	0
Other Europe	---	22	18	15	6	---	-	-	-	-	0
FSU-12	---	19	23	14	7	---	-	-	-	-	0
Russia	---	22	28	13	5	---	-	-	-	X	25
Middle East	---	17	12	6	6	---	-	-	-	-	0
Turkey	---	8	12	13	12	---	-	-	-	-	0
Saudi Arabia	---	14	13	4	1	---	-	-	X	X	50
Africa	---	13	10	8	6	---	-	-	-	-	0
North Africa	---	16	15	7	8	---	-	-	-	-	0
Egypt	---	10	11	11	11	---	-	-	-	-	0
Sub-Saharan	---	22	20	9	8	---	-	-	-	-	0
Oceania	---	37	37	18	24	---	-	-	-	-	0
Transshipments via Canada	---	4	3	2	1	---	X	X	X	X	100
Average error and accuracy	---	13	12	7	5	---	16%	21%	47%	63%	37

¹ Forecast made for following fiscal year, with 15 months out. ² Forecast made for current fiscal year, with 3 months remaining in current fiscal year. - = Error exceeds 5 percent. --- = No forecast available.

Table 8--Reliability of quarterly U.S. import projections, by commodity and quarter

Commodity	Average forecast errors fiscal 2002-07					Forecast accuracy fiscal 2002-07					Forecast accuracy
	Aug ¹	Nov	Feb	May	Aug ²	Aug ¹	Nov	Feb	May	Aug ²	
Import value	<i>Percent</i>					<i>"X" if error ≤ 5%</i>					<i>Percent</i>
Livestock and products	9	5	7	6	2	-	X	-	-	X	40
Livestock and red meats	10	6	9	7	2	-	-	-	-	X	20
Live animals, except poultry	22	16	21	11	4	-	-	-	-	X	20
Red meat and products	11	9	6	6	2	-	-	-	-	X	20
Beef and veal	11	9	8	9	2	-	-	-	-	X	20
Pork	5	5	8	5	0	X	X	-	X	X	80
Dairy products	9	7	6	6	1	-	-	-	-	X	20
Grains and feeds	6	5	2	2	0	-	X	X	X	X	80
Grains	11	8	6	14	3	-	-	-	-	X	20
Grain products	3	3	2	1	0	X	X	X	X	X	100
Feeds and grain products	9	7	4	0	1	-	-	X	X	X	60
Oilseeds and products	14	14	8	7	3	-	-	-	-	X	20
Vegetable oils	13	14	6	9	7	-	-	-	-	-	0
Horticulture products	9	7	4	2	1	-	-	X	X	X	60
Fruits and preps., and juices	9	8	5	4	13	-	-	X	X	-	40
Fruits, fresh or frozen	24	15	8	5	2	-	-	-	X	X	40
Fruits, prep. or pres., and juices	6	7	4	3	1	-	-	X	X	X	60
Nuts and preparations	20	14	12	4	5	-	-	-	X	X	40
Vegetables and preparations	4	3	4	1	1	X	X	X	X	X	100
Vegetables, fresh or frozen	5	4	5	2	1	X	X	X	X	X	100
Vegetables, prep. or pres.	2	2	2	2	1	X	X	X	X	X	100
Wine and malt beverages	5	4	4	2	1	X	X	X	X	X	100
Wine	4	4	3	3	4	X	X	X	X	X	100
Malt beverages	5	3	5	4	1	X	X	X	X	X	100
Essential oils	6	4	3	4	3	-	X	X	X	X	80
Cut flowers and nursery stock	7	6	6	1	0	-	-	-	X	X	40
Sugar and related products	30	31	21	6	4	-	-	-	-	X	20
Confections	8	4	4	4	4	-	X	X	X	X	80
Tobacco, unmanufactured	8	13	18	14	9	-	-	-	-	-	0
Cocoa and products	14	11	13	2	3	-	-	-	X	X	40
Coffee and products	10	9	6	4	3	-	-	-	X	X	40
Natural rubber and gums	19	16	21	10	4	-	-	-	-	X	20
Spices, natural drugs, tea	13	7	9	11	0	-	-	-	-	X	20
Tobacco, seeds, other veget.	16	10	16	21	3	-	-	-	-	X	20
Other products	5	5	4	2	0	X	X	X	X	X	100
Total agricultural imports	6	5	3	1	1	-	X	X	X	X	80
Average error and accuracy	10	8	8	5	3	24%	38%	43%	62%	92%	52
Import volume											
Wine (HL)	5	4	1	0	0	X	X	X	X	X	100
Malt beverages (HL)	5	5	5	4	3	X	X	X	X	X	100
Beef and veal	12	12	5	3	4	-	-	X	X	X	60
Dairy products	33	33	29	17	0	-	-	-	-	X	20
Grains and products	16	12	11	3	2	-	-	-	X	X	40
Fruits, fresh or frozen	5	5	4	3	0	X	X	X	X	X	100
Fruits, prepared or preserved	8	3	6	3	3	-	X	-	X	X	60
Nuts and preparations	18	10	14	7	8	-	-	-	-	-	0
Vegetables, fresh or frozen	4	3	3	3	1	X	X	X	X	X	100
Vegetables, prep. or pres.	7	8	3	4	1	-	-	X	X	X	60
Oilseeds and products	11	11	12	5	1	-	-	-	X	X	40
Vegetable oils	8	7	6	5	1	-	-	-	X	X	40
Sugar, cane and beet	8	7	7	3	11	-	-	-	X	-	20
Cocoa and products	11	9	12	7	7	-	-	-	-	-	0
Coffee and products	5	4	5	4	4	X	X	X	X	X	100
Rubber and allied gums	15	11	11	10	4	-	-	-	-	X	20
Average error and accuracy	10	9	8	5	4	31%	35%	42%	69%	69%	49

¹ Forecast made for following fiscal year, with 15 months out. ² Forecast made for current fiscal year, with 3 months remaining in current fiscal year. - = Error exceeds 5 percent. - - - = No forecast available.

Table 9--Reliability of quarterly U.S. import projections, by country and quarter

Country/region	Average forecast errors fiscal 2002-07					Forecast accuracy fiscal 2002-07					Forecast accuracy
	Aug ¹	Nov	Feb	May	Aug ²	Aug ¹	Nov	Feb	May	Aug ²	
Import value	<i>Percent</i>					<i>"X" if error ≤ 5%</i>					<i>Percent</i>
Western Hemisphere	---	3	2	1	1	---	X	X	X	X	100
Canada	---	4	3	3	2	---	X	X	X	X	100
Mexico	---	6	5	4	2	---	-	X	X	X	75
Central America	---	3	4	2	0	---	X	X	X	X	100
Costa Rica	---	11	6	4	1	---	-	-	X	X	50
Guatemala	---	4	4	6	0	---	X	X	-	X	75
Other Central America	---	6	6	8	8	---	-	-	-	-	0
Caribbean	---	0	10	10	0	---	X	-	-	X	50
South America	---	4	3	2	6	---	X	X	X	-	75
Brazil	---	8	7	5	3	---	-	-	X	X	50
Chile	---	2	4	6	2	---	X	X	-	X	75
Colombia	---	5	5	1	2	---	X	X	X	X	100
Other South America	---	4	1	1	3	---	X	X	X	X	100
Europe and Eurasia	---	7	5	5	2	---	-	X	X	X	75
European Union-25	---	7	5	3	2	---	-	X	X	X	75
Other Europe	---	27	15	11	10	---	-	-	-	-	0
Asia	---	5	5	3	1	---	X	X	X	X	100
East Asia	---	10	5	1	2	---	-	X	X	X	75
China	---	10	3	3	4	---	-	X	X	X	75
Other East Asia	---	6	9	0	3	---	-	-	X	X	50
Southeast Asia	---	10	10	6	2	---	-	-	-	X	25
Indonesia	---	12	11	4	2	---	-	-	X	X	50
Thailand	---	11	12	6	2	---	-	-	-	X	25
Other Southeast Asia	---	4	5	0	0	---	X	X	X	X	100
South Asia	---	0	9	4	2	---	X	-	X	X	75
India	---	4	7	4	2	---	X	-	X	X	75
Oceania	---	3	7	6	1	---	X	-	-	X	50
Australia	---	5	6	3	4	---	X	-	X	X	75
New Zealand	---	5	9	5	4	---	X	-	X	X	75
Africa	---	12	16	4	6	---	-	-	X	-	25
Sub-Saharan	---	3	19	4	8	---	X	-	X	-	50
Ivory Coast	---	19	34	8	8	---	-	-	-	-	0
Middle East	---	6	9	3	2	---	-	-	X	X	50
Turkey	---	4	10	0	4	---	X	-	X	X	75
Average error and accuracy	---	7	8	4	3	---	51%	43%	71%	80%	61

¹ Forecast made for following fiscal year, with 15 months out. ² Forecast made for current fiscal year, with 3 months remaining in current fiscal year. - = Error exceeds 5 percent. --- = No forecast available.

Contact Information

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Foreign Agricultural Service homepage: <http://www.fas.usda.gov/>

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